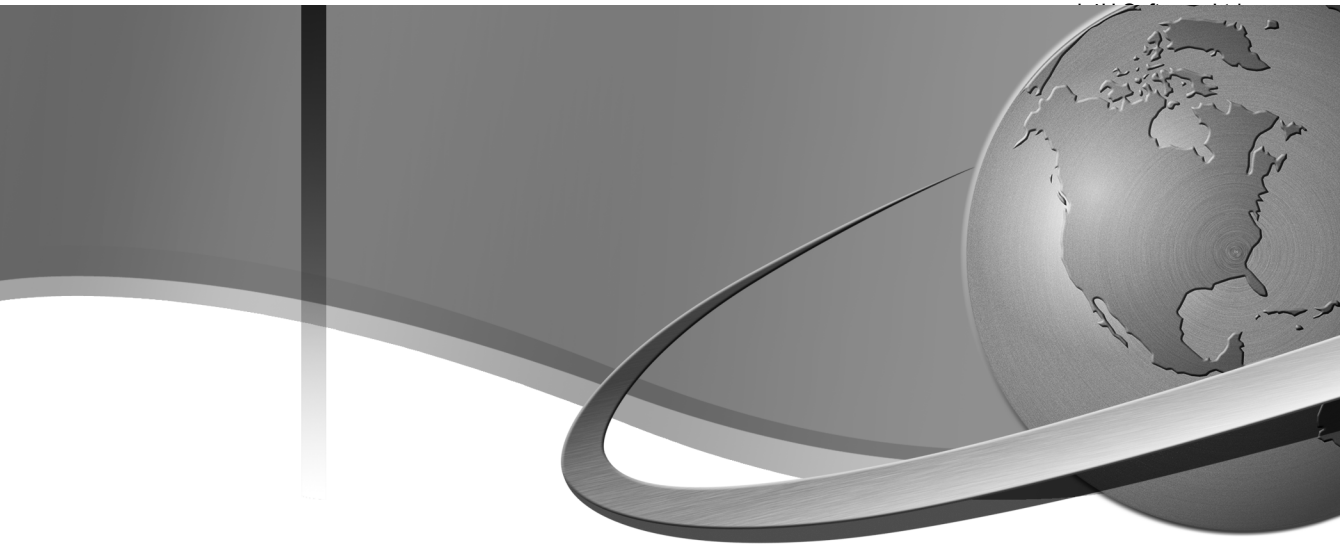

NEW FEATURES

in Enterprise/Elite 4.2

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Introduction

Welcome to **L4U Library Software** - *Library Management Made Easy!*™ The staff at L4U Library Software thanks you for your purchase. We are confident that you will find our software to be a valuable tool in ensuring the efficiency of your library operations.

About this Manual

This user guide describes the new features in Enterprise/Elite v4 and complements the *L4U Users Manual* and the *L4U Web Manual*. Some of the features in this guide are location specific and only apply to Enterprise users. For example, a librarian can control which locations have access to her book reviews. This feature is Enterprise only as Elite is one location only and is not applicable.

It is assumed that L4U Enterprise/Elite is installed. A quick overview of the product is available in the Quick Start Guide.

Note: L4U documentation assumes you have a working knowledge of your operating system and its conventions, including how to use a mouse, standard menus and commands. You should also know how to open, save, print and close files. For more information on these techniques, consult the documentation that came with your computer.

Paid versus No Charge Features

Enterprise 3.x refers to any L4U Enterprise v3.2 or later installation. Enterprise 4.x refers to the enhanced, paid upgrade of L4U Enterprise. All Elite 4 installations include both the No Charge and Paid features.

No Charge Upgrade

- PDF Labels
- New RDA Import Template Mark
- New RDA Custom Tags
- Option to strip extra local holdings on Library File export
- Client/Patron Batch Import process upgraded (limited functionality in v3.3)
- Updated/New Skins
- iPAC Authority Search Enhancements

Paid upgrade

New Features for the Library Patron are discussed in more detail starting on page 3.

- Item details now show the status of all copies of an item
- Copies available display now takes reserves into account
- Book Reviews

The following Paid Features are discussed in more detail in New Features for the Librarian starting on page 9.

- Master Records
- Picture Library for Loan Types
- Web Based Admin Area
- Homeroom & Control File Management on the Web
- New Availability Icons
- RDA Automatic detection
- Library File Recycle Bin
- Location Based Circulation Sounds selection
- AMICUS search option in CheckMARC lookup
- Overdrive Authentication
- Wikipedia Federated Search
- Learn 360 Support
- Location Specific Holiday calendars
- Location Managed Federated searches
- Communal locations
- Enhanced support of Electronic Resources (i.e. E-Books, etc)
- Message Center for L4U Administrators
- Book Covers included in Overdue Notices
- PDF Labels
- Top Ten
- Overdue Letters in Freedom
- Ability to Add bookcover from a picture file
- Added ability to hide patron details in Freedom Basic circulation
- Freedom Quick Reports
- Collection Analysis Report
- Item histories in Freedom library file
- Manual selection of MARC Import Templates in Freedom Acquisitions
- Client/Patron Batch Import process upgraded (full functionality in paid upgrade)
- Freedom Circulation by Homeroom

The district technician or the district librarian will enjoy the following features starting on page 37.

- POP3/SMTP SSL in L4U
- Client/Patron Batch Import process for automatic importation

Notational Conventions

- Dialog box names, options, menu names, button names, and menu commands will appear in *Italic type*.
- Case sensitive characters, that are required to be typed as is, will appear in **Bold**.

- Shortcut options may be provided and will appear in square brackets (Example: [Ctrl 1]).
- Navigating through the menus will be represented with the ">" symbol. (Example: Choose *File* > *Import File*, means select the sub-menu *Import File* from the *File* main menu).

Keyboard Conventions

- Names of keys that you type will appear in SMALL CAPITALS (Example: TAB and SHIFT)
- While in the *L4U Enterprise Admin Utility*, the DOWN ARROW on the keyboard starts a Search or Query. For example, in Power Search, L4U will start the search once the DOWN ARROW is pressed. A drop down list may appear. To proceed, click on the desired item in the drop down list. This is not the case for L4U on the Web.
- A plus sign (+) between two key names means that you must press those keys at the same time (Example: "Press ALT+TAB", means that you hold down ALT while you press TAB).
- You can choose menu commands by pressing the key combination listed next to the particular menu command. For example, in Windows "CTRL+Y" or in Macintosh "⌘+Y" may be used to reach the circulation screen. These are referred to as shortcuts.

Icons

The following table describes the icons that are used throughout this manual.

Icon	Description
	Notes contain explanations of possible results or alternative methods of performing a task. These notes may also suggest best practices.
	Contains warnings about possible loss or damage of data.

General Tips & Tricks in L4U

Please consult the *L4U Users Manual* or the *L4U Web Manual* for Tips & Tricks when using the L4U Product.

Company Profile

L4U Library Software has been developing library automation software since 1985 and our Management Team has been working with the educational marketplace since 1980. The L4U product is the result of countless suggestions from users, prospects and librarians from all over the world.

L4U Library Software offers a complete range of products and services designed to meet the needs of the K-12 school library marketplace. All items are available in either Windows or Macintosh configurations.

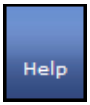
- **L4U Enterprise** - Our main product is L4U Enterprise. This is a platform independent school library management system designed for the K-12 marketplace. L4U Enterprise is a set of features designed for use in a centralized environment such as a school district. This solution consists of the L4U Enterprise Admin Utility software and L4U Freedom.
- **L4U Platinum Elite** - Platinum Elite is targeted for smaller installations and is ideally suited for this environment. L4U is sold in either Single User (Standalone) or Multi User (Network) configurations and supports Windows XP/Vista/7 or Macintosh OS 10 (Intel Only) or greater operating systems.
- **L4U Add-Ons** - In addition to the L4U software, we offer additional products for use with L4U.
  - **Advanced Bookings** is a more robust and feature intensive version of L4U designed to facilitate the needs of a District Resource Centre or any other site requiring long term reservations and shipping controls.
  - **CheckMARC** is a MARC record collection from which you can search and obtain MARC records. CheckMARC is used directly from the Acquisitions area within the L4U program and is purchased as an online subscription.
- **Support Packages** - L4U Software provides various support packages which include options such as email, fax, phone and online technical support. Some support packages also contain product patches and upgrades.
- **Training** - Product Training is available in a variety of formats. Online training is available via a web connection as individual or packaged modules. Previously recorded training CD's are available on a variety of topics. Certified trainers are available for on-site training or in-house training.
- **Conversions -** Convert existing library management systems (MARC, MicroLIF, ASCII exports) to L4U format. L4U Library Software can convert most automation systems to L4U without rebarcoding or re-entering your collection. Process and pricing vary depending upon the format of your current data.
- **Scanners, Printers and Consumables** - Barcode Labels of various sizes and formats, Label Protectors, Client Cards, Barcode Readers and Printers, Portable Inventory Scanners and Slip Printers are also available from L4U Library Software.

L4U Resources

There are several resources available to assist you with the L4U program. To completely understand and utilize all the functions and features available, we recommend you take advantage of these resources.

Context Sensitive Help

Context Sensitive Help is available throughout the iPAC and L4U Freedom wherever these icons appear. Click this icon to display the relevant information in the L4U Manual.



Support Packages

In a continuing effort to provide the best customer service possible, we offer a choice of support packages. They include options such as toll-free phone support, free upgrades, remote access for problem solving and access to tech notes. If you have purchased a support package, details are provided with your software package. If you are interested in purchasing support and would like information and pricing contact:
Sales@L4U.com

Web Site

L4U users can keep up to date on the latest releases and news by visiting our web site. Useful Tech Notes and Frequently Asked Questions (FAQ's) can also be accessed from the web site. Visit us anytime:
http://www.L4U.com

Client Corner

Client Corner is a limited access area of the L4U Website (http://www.L4U.com). Clients with valid Support Packages are issued user ID's and passwords to view these pages. Information such as current software releases, Quick Tip Archives, Tech Notes and account information are all accessible using your password. Through Client Corner, you can request support, report a program defect and enter a feature request. All requests are automatically logged in L4U Library Software's internal client management system and reviewed by Support and Development technicians.

Email Support

Email is a wonderful tool for obtaining support for your L4U software. In addition to a quick response time, you also have the ability of attaching files such as screen shots and import files. The attached information helps the technician understand your particular concern much faster. To access our support department through email, simply send an email to:
Support@L4U.com

Telephone Support

Telephone support is included with most Support Packages. This service can be available via a toll free number, 24 hours a day, 7 days a week. Our technicians will be happy to answer any questions that you may have about your L4U software. In order to answer your call as quickly as possible, please have the following information available.

- Customer ID #
- Library name
- A telephone number where you can be reached
- Whether this is a new call, or a previous incident (If it is a previous incident, please have the incident number available)

During the telephone support process you will be issued an incident number for your call. This incident number will remain with your support record indefinitely. If you are calling about an ongoing issue, simply provide the incident number to any technician and they will be presented with the complete call history.

At times, you may be asked to perform some tasks on the computer. If your phone is not next to the computer, you may have to complete the call with the technician, work on the computer, and then have the technician contact you again. For this reason it is imperative to have a number at which we can reach you. If your site has automated voice mail, please ensure our technicians know how to reach you for after hours incidents.

Real Time Support & Help via WebEx

Using Cisco WebEx Support Center, L4U Support can deliver instant, personalized remote support to users regardless of location. Using WebEx, L4U Support can shorten call times, increase first call resolution, minimize onsite service visits, and reduce overall support costs. WebEx services are available to all Support Packages that include call in support.

Chapter 1

For the Library Patron

New Features - For The Library Patron 4
Authority Search Enhancements 4
Other iPAC Enhancements. 6
Federated Search Enhancements 7

Chapter 2

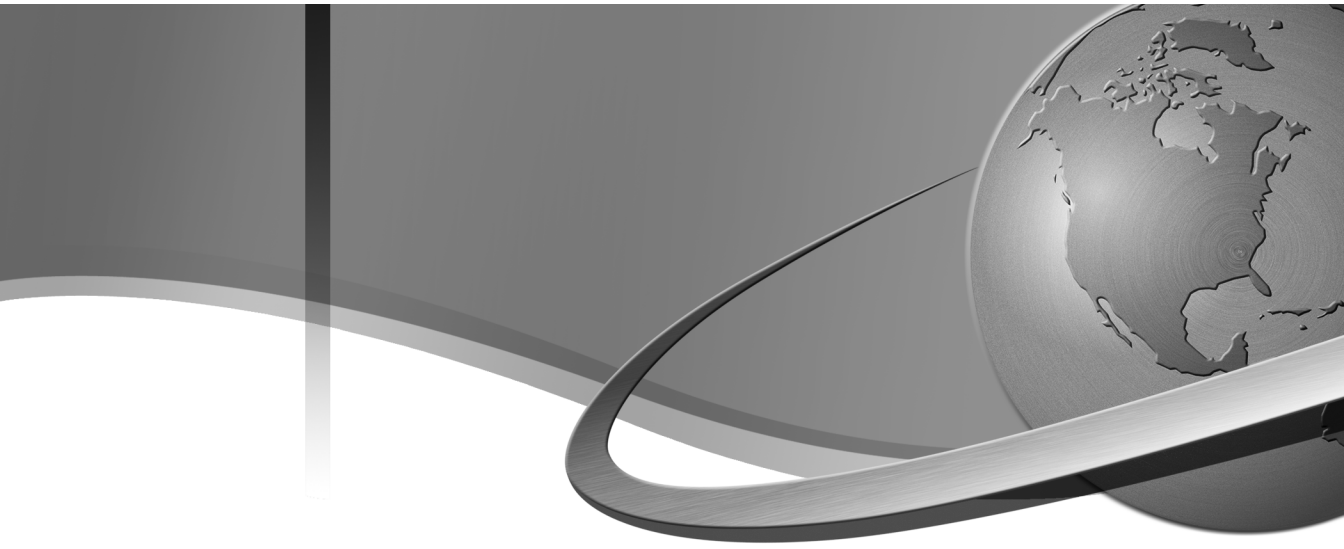
For the Librarian

For The Librarian 10
Book Reviews. 10
Web Administration 12
eBook Enhancements 12
PDF Labels 13
RDA Support 16
CheckMarc Enhancements - AMICUS 20
OverDrive Support 21
Enhanced Loan Type Graphics 22
New Location Preferences 22
Communal Locations 23
Library File Recycle Bin 24
Top 10. 25
Item Histories in Freedom 28
Bookcovers - Add Your Own. 28
MARC Record View 29
Freedom Circulation by Homeroom. 29
Freedom Report Enhancements 30
Overdue Letters in Freedom. 32
Quick Reports. 34
Statistics Reports 34
Freedom Search Update: How does it work? 35

Chapter 3

For the Technician

For The Technician. 38



CHAPTER 1

FOR THE LIBRARY PATRON

- Book Reviews
- Authority Search Enhancements
- Top Ten: Popular Materials
- Top Ten: Recommended Reading & Award Winners
- Item Status Badge & Other New Features
- Federated Search Enhancements

L4U Enterprise/Elite 4 New Features - For The Library Patron

Enterprise/Elite 4 has new features that engage the Library Patron and allow them access to more services that your library provides. These new features are described on the following pages.

Book Reviews

Library patrons can add reviews of library resources. The patron must login to the iPAC and they add the review in the Item Details screen. The patron can modify or delete their review at any time. Reviews are moderated and once approved, they can be viewed by other library patrons in that location and optionally, in other locations. Book review privileges are set in Homeroom Privileges, please see “Book Reviewers & Moderators” on page 10. Location Book Review options are configured in Location Preferences, please see “Book Review Location Preferences” on page 10.

To place a Book Review:

1. Login to the *iPAC*
2. Locate an item in the iPAC
3. Open the item
4. Click *Review/Rate this item* at the bottom of the Item Detail page
5. Enter your review and optionally rate the item
6. Click *Save Review/Rating*
    - Only the reviewer and the moderator can see the review until the review is approved by the moderator.
    - The patron's own review always shows at the top of the list

Authority Search Enhancements

All searches from the iPAC Quick Search page perform a KEYWORD CONTAINS and not all words are keyworded. This can result in a confusing list of search results if the patron performs an authority search that consists mainly of excluded keywords.

For example, if a patron enters ME AND YOU and clicks *Title*, L4U in essence, ignores AND & YOU as they are excluded keywords. Since one word remains - ME, L4U performs a contains search in the Title Authority keywords for all the Titles that contain ME. L4U’s iPAC now has two features to help patrons locate these materials.

Keyword and Phrase Searching

The library patron has the option to toggle between Keyword search results (as L4U has always worked) and a Phrase Search. Click by Phrase or by Keyword to achieve the desired search result.

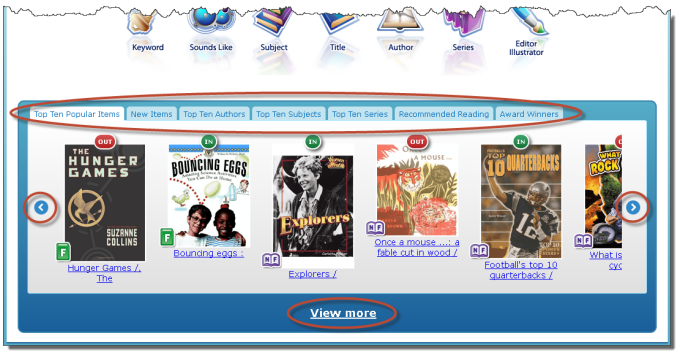
Double Quotes

To use this feature from the Quick Search screen, put Double Quotes around your search term. This type of search treats the entire phrase as a single word. This is similar to Google searching where you need to find a specific phrase within a field:

- e.g. "CAT AND" will return *Cat and the Wizard, The* and *Cat and mouse in a haunted house*.

Note: These Authority Search Enhancements are implemented for Subject, Title, Author, Series and Editor/Illustrator type searches only.

Top 10



This feature will allow your patrons to explore your collection with reading suggestions by popular Titles, Authors, Subjects and Series. New Items are also shown and the librarian can create and modify their own Award Winners and Recommended Reading lists. Access to these features is controlled by the librarian. For more information on how to configure Top Ten, see “Top 10” on page 25.

To use the Top Ten features:

1. From the iPAC screen, do one of the following:
   - *Click the desired tab:* The Top Ten Popular Items is the default tab but the other tabs are available. Recommended Reading and Award Winners may not be visible and are controlled by the librarian.

- *Click the desired item:* This will open the record in the Item Detail View.
- *Click the Next or Previous Arrows:* More records will appear that match the current tab you are in.

2. To view more items in the desired category, Click *View more*.
   - The Next or Previous Arrows will display 15 items at a time.
3. Click the Plus sign beside the item to expand the selection.

Other iPAC Enhancements

Other enhancements in the iPAC allow the patron to identify which materials are available and what loan type it is. The enhancements are visible from the Top Ten lists and in the Item Detail view.

These enhancements include:

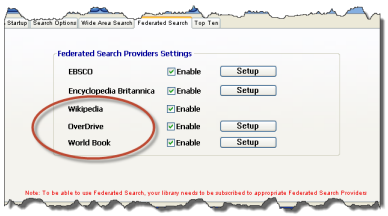
- *Status badge*: Identifies if the material is currently in the library or out and not available.
- *Loan Type graphic:* Choose from a collection of new icons included in Enterprise/Elite 4. These enhanced graphics look great in the iPAC and allow the patron to identify material type. Please refer to page 22 for more information on Enhanced Loan Type Graphics.
- *Available:* Availability of the material is found in the Item Detail. L4U displays the total number of copies in this copy group, copies available and number of holds/reserves against this title.
- *eBook Download Links:* If these materials are available in the collection. L4U can show how many downloads are available and any text the librarian desires.

Note: Copy Management must be enabled for the Availability display to function properly. For more information, see “Copy Management” on page 38 in the *L4U Users Manual*.

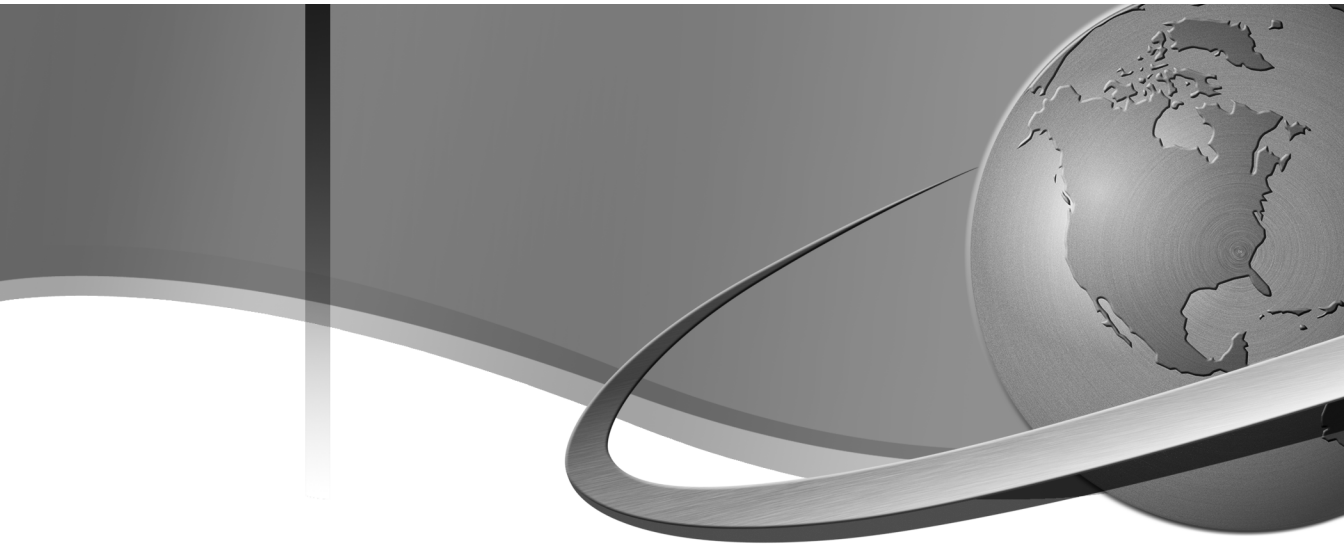
Federated Search Enhancements

New Search
No matches have been found for your search
Try to search other locations than: Amy Woodland Elementary Library
Wikipedia Search Results: View Results
OverDrive Search Results: View Results
World Book Search Results: View Results

Federated Search in Enterprise 4 includes the ability to search more online resources. Once authenticated with the proper credentials, L4U will concurrently search all enabled Federated Search sources. In addition to EBSCO and Encyclopaedia Britannica, L4U can now search Wikipedia, World Book and OverDrive. For more information on using Federated Search, see “Federated Searches” on page 52 of the *L4U Web Manual*.



Wikipedia does not need a subscription but the other sites will require authentication. Please contact your IT Department or appropriate departments in your institution to determine which services you subscribe to. For more information on OverDrive Configuration, see “OverDrive Support” on page 21.



CHAPTER 2

FOR THE LIBRARIAN

- PDF Labels
- Book Reviews
- CheckMARC Enhancements - AMICUS
- Overdrive Support
- Enhanced Loan Type Graphics
- New Location Preferences
- Library File Recycle Bin
- Configuring Top 10
- Collection Analysis Report in Freedom
- Freedom Quick & Statistical Reports
- Overdue Letters
- Freedom Search Update

L4U Enterprise/Elite 4 New Features - For The Librarian

Enterprise/Elite 4 builds on the existing extensive feature set of earlier versions and gives the librarian more control over their customer's experience.

Book Reviews

Book Reviews is a wonderful tool that allows your library patrons to voice their opinions about the items in your collection. The librarian can choose which patrons can place or moderate reviews. The librarian can choose to accept reviews from other locations and/or supply their reviews to other locations. Reviews are applied to all copies of the reviewed item.

Enabling Book Reviews

The master switch for Book Reviews has to be enabled in Global Preferences. To do so:

1. In the Admin Utility, select *File>Preferences*
2. From the *L4U iPAC* button, click *Search Options*
3. Click *Yes* in *Show Item Reviews* to allow Book Reviews
4. Other options are:
   - *Display Reviewer's Name:* Leave this as *No* for anonymous reviews
   - *Require circulation for review:* Enable this to ensure the patron has actually circulated the material
5. Click *Save* to exit Global Preferences

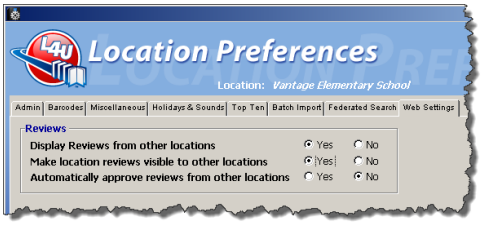
Book Reviewers & Moderators

Who can place reviews and who can moderate them is configured in Homeroom Privileges. A patron can place reviews, moderate reviews or both. To do so:

1. In the Admin Utility, select *Functions>Homerooms*
2. Open the desired Homeroom
3. Click *Web Privileges*
4. Click the desired Book Review options to enable them
5. Click *Save* to save edits in Web Privileges
6. Click *Save* to exit Homerooms

Book Review Location Preferences

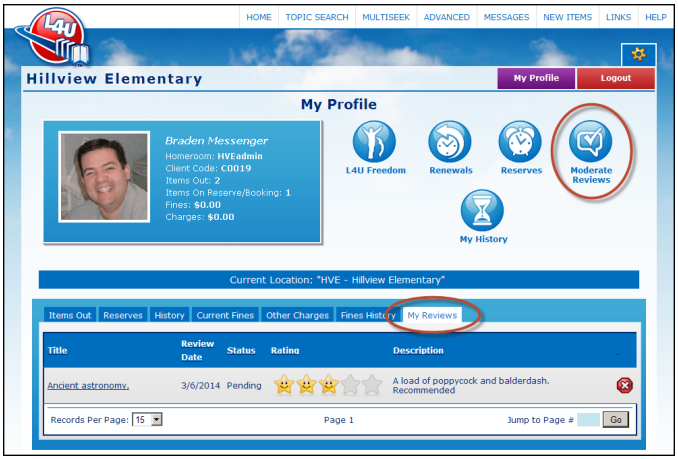
The librarian can restrict or allow the flow of reviews to other locations in the Enterprise installation. The location must have a copy of the same item for the review to appear in the Item Detail screen in their iPAC.



1. In the Admin Utility, select *Authority Files>Locations*
2. Open the desired Location
3. Click *Preferences*
4. Click the *Web Settings* tab
5. Click the desired options to enable them
6. Click *Save* to save edits in *Location Preferences*
7. Click *Save* to exit *Locations Management*

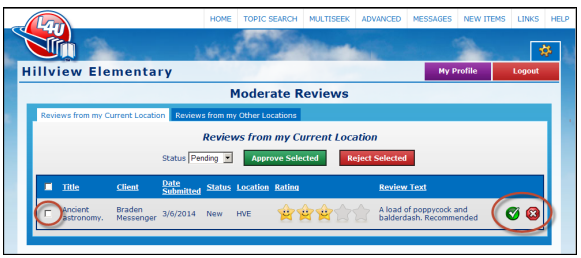
Moderating/Reviewing Book Reviews

Moderators manage Book Reviews from My Profile in L4U on the Web. My Profile also lists the reviews and their status the user has submitted. From the Moderate Reviews button, the moderator can individually or batch select reviews to be approved or rejected.



To moderate reviews:

1. Log into the iPAC
2. From My Profile, Click *Moderate Reviews*
3. Select the desired tab: Reviews from my Current Location or Reviews from my Other Locations
   - The Other Locations tab may not be available if the Location Preference setting is disabled



4. Approve or Reject reviews by:
   - Click the Green check or the Red X for the desired item

- Click the desired item's check box and then Click the Approve Selected or Reject Selected button

5. When finished, Click *My Profile* or another on screen option

Web Administration

It is now possible to create and modify Control Files, Homerooms and Locations from the web. The green flavoured Web Admin area is accessed from My Profile after any of the Admin Options are enabled. These options are configured in Homeroom Web Privileges.

To do so:

1. In the Admin Utility, select *Functions>Homerooms*
2. Open the desired Homeroom
3. Click *Admin Privileges*
4. Select the required permissions from the drop down beside the desired function. The permissions are:
   - *None:* No access to this function. If all functions are set to None, the Admin area will not be visible on the web.
   - *Read:* Allows access to this function but cannot add, delete or save.
   - *Add:* Allows the ability to create new items but not edit or delete existing items.
   - *Full:* Full access to the item, i.e: add, modify, delete and save.
5. Click *Save* to save edits in *Admin Privileges*
6. Click *Save* to exit Homerooms

To access Web Administration:

1. Login to the iPAC
2. From *My Profile*, Click *Admin*

eBook Enhancements

eBooks (or more accurately, eResources) are now more strictly defined. A item is defined as an eBook if one of the following conditions is true:

- Belongs to the *eBook Location*
- Has a Resource that is checked as an *ebook*
- Belongs to a Loan Type that contains *ebooks*
- Belongs to a Media Type that contains *ebooks*

When an eBook link is clicked, the click is recorded. L4U performs basic counting for limiting distribution of this item. The book is again available for download once the loan period expires. There is a report available to show the eBook Clicks, please refer to page 35.

The L4U Application Specialist can allow access to ebook resources to everyone by enabling *Allow Public eBook Download* in *Global Preferences>L4U iPAC>Search Options*.

PDF Labels

Easy Labels is now called PDF Labels. PDF Labels allows L4U to avoid potential printing issues in the default internet browser. Almost every internet browser has a different way for the end user to configure page margins. L4U now prints the label template to PDF which guarantees a proper layout of labels on the label stock. All that needs to be determined is the initial print position. In other words, the top and left printer margins. PDF Labels has the Printer Calibration Wizard to help determine these values.

Enterprise/Elite 4.1b includes new Master Templates. These Master Templates are read only and include:

- *Acquisitions & Library File Barcodes:* New templates are *Avery 5160-8160 - 2013* & *Dymo 30336*. The Avery template is for 3x10 labels on 8.5 x 11 label stock. The Dymo 30336 is for use with the Dymo Labelwriter.
- *Acquisitions & Library File Spine Labels:* New templates are *Spine 8x7 C - 2013*, *Spine 8x7 L - 2013* for center or left justified respectively. Use this template for 8x7 labels on 8.5 x 11 label stock. The *Avery 30332* template is for the Dymo LabelWriter spine labels.
- *Client File Templates:* Client File has several new templates that support 3x10 label stock. One template has the client picture and other relevant client information. The other template does not have the client picture and has room for 14 digit client barcodes. The Avery label templates support different print resolutions, depending on the number of characters in the Client Code.

PDF Labels Printer Calibration Wizard

The PDF Labels Printer Calibration Wizard is a new feature in L4U v4.1b that determines your printer margins. The user must first run the Wizard before any labels can be successfully printed. The Wizard only needs to be run once or if the Printer Margins are accidently zeroed. A ruler with metric or imperial measurements is also

required. Remember to save your session when logging out of Freedom as the Printer Margin settings are saved in your current session.

Tips

- Take your time and read the directions on the screen. The wizard should take no more than 10 minutes to calibrate PDF Labels for you.
- Proceed through the steps one at a time. Restart the Printer Wizard if you get interrupted. Click Home in the PDF Labels Printer Calibration Wizard toolbar to do so.
- PDF Labels relies on the Acrobat PDF Plugin to produce the labels. Ensure *Actual Size* is selected and *not* any scaled option such as *Shrink oversized pages* or *Scale pages*.

Note: *Dymo LabelWriter users*: There is no need to run the PDF Labels Print Calibration Wizard.

To use the PDF Labels Printer Calibration Wizard

1. From Acquisitions or Library File (both Freedom & Admin Utility) and Freedom Client File, Select the items to print
2. Click PDF Labels (or Easy Labels in the Admin Utility)
3. Click Calibrate Printer
4. Select the Unit of Measurement
5. Follow the directions, one screen at a time until finished
6. The Printer Wizard has not been to Hogwarts but it will try it's best to determine your printer's Print Margins. The Print Wizard will arrive at one of three conclusions:
   - *Success!* You're good to go. Any of the new templates supplied are available for immediate use. Test your old Easy Label templates before printing using PDF Labels.
   - *Warning* The measurements entered are out of the Wizard's expected values but the labels may still print fine. Test Page #3 printout will provide you with an answer.
   - *Error* Something is wrong with the printer margins, or the value entered had the decimal in the wrong spot or some other unknown error. Check your measurements and printer and start the Wizard again.

Using PDF Labels

Using PDF Labels hasn't changed from Easy Labels, other than the Starting Label option. Specify which label position to start printing is now on the PDF Labels main screen and not in Print Preview. For more information on Using PDF Labels in Freedom, please refer to "EZ Labels" on page 103 of the *L4U Web Manual*. Using PDF Labels in the Admin Utility is discussed in "Easy Labels" on page 210 of the *L4U Users Manual*.

Modifying PDF Labels

Modifying PDF Labels is easier in Enterprise/Elite 4.1b. The new templates cannot be modified but there is a process to save a new copy of the template and incorporate the desired edits. Keep your edits simple! The following features of a Label template can be modified by the end user and are supported by L4U.

- File Name & Description
- What fields appear on the template
- Font Family
- Font Size
- Alignment

To modify an existing template:

1. From the PDF Labels main window, select *Barcode* or *Spine.*
2. Select the desired template from the drop down list.
   - For example, it may be desirable to modify one of the new Master Templates to reflect the district's standards. However, it has to be saved as a different name as Master Templates are read only.
3. Click *Advanced*
4. Click *Expand*
   - Do not modify any settings in the *Adjust Template Settings* (other than *Method to Apply*) unless instructed by L4U Technical Support or this documentation.
5. Make the desired changes from the *Label Settings* window.
   - *Field Name:* Select the field from the drop down.
   - *Font Family:* Select the font from the browser supplied font list.
   - *Font Size:* Most users will find 10 to 11 point to be optimum.
   - *Alignment:* Select *Left*, *Center* or *Right* as appropriate.
   - *Column:* Ensure this is set to *Both*.

Note: *Labels with the Barcode Field*. The Barcode field is special. It occupies two rows to accommodate the actual barcode. You can place this field in any row as long as the row below it is empty. To do this, select *Please Select* for all five columns. Also, 15 Point should be fine for most modern laser printers, although it is recommend to test your selected font size.

6. Click *Verify label size* to ensure the changes will fit in the label cell.
7. Click *Save As*
   - Enter a new name for this template and Click *OK*
8. Click *Home* to return to the PDF Labels home page.

The other buttons are:

- *Save* to save your changes to this template
- *Save As* allows you to save your edits as a template with a different name
- *Save as Default* to save your changes and make this the default Barcode/ Spine label as applicable.
- *Reset* to discard the edits and return the template to it's last saved state.
- *Preview PDF* to preview the last saved version of the template

Adjust Label Layout

PDF Labels can allow for some minor changes to margins and other label dimensions to fine tune the printing. Please remember:

- These edits are not supported by L4U
- Make your desired edits on a copy of the template

However, you can make one change in the *Adjust Label Layout* that L4U does support and that is *Method to Apply.* This setting determines where L4U breaks the Local Call Number when printing Spine Labels.

To Adjust a Label Template

1. From the PDF Labels main window, select the desired template from the drop down list.
2. Click *Advanced*
3. Click *Expand*
4. Select one of the following options from *Method to Apply*
   - *Break on Space:* L4U breaks the Local Call Number on the space
   - *Break on Period:* Everything before the Dewey period prints on this line and everything after the period prints on the next line
   - *Break on Period and Space:* Combination of Option 1 & 2 above
5. If you edited any other option in *Adjust Template Settings*, Click the Verify Label Size.
6. Click one of the buttons at the bottom of this page to Save your edits or not as appropriate.

Note: Please do not modify the other values or fields in a PDF Label Template. If a custom label template is required, please contact L4U at (800) 667-3634 for a quote on custom template creation.

RDA Support

L4U Enterprise/Elite 4 supports Resource Description and Access (RDA) MARC Tags. Also, Enterprise/Elite 4 includes new Tags to support the MARC savvy librarian. L4U will import the new MARC Tags and the recommended RDA Tags when upgrading to Enterprise 4.

There are other RDA MARC tags and you are able to select which L4U field the RDA Data is placed using your own RDA Import Template or modifying the new Default RDA Template. Also, other relevant RDA Tags (i.e: 336a, 336b, 337b, 338a, 338b, etc) will be mapped to the L4U Field Notes 30 and up.

In addition to the new tags, there are new media terms/descriptors for the 336, 337 & 338 that the librarian may wish to include in their Media File. The Term and Codes List for RDA Content, Media and Carrier Types can be found at the Library of Congress website.

For more information on MARC Tags and How to Import Templates, please refer to Chapter 21 MARC Records in the L4U User Manual

New Tags in Enterprise/Elite 4

Tag	Description
258	Philatelic Issue Data
336	Content
337	Media Type
338	Carrier Type
344	Sound Characteristics
345	Projection Characteristics of Moving Image
346	Video Characteristics
347	Digital File Characteristics
363	Normalized Date and Sequential Designation
365	Trade Price
366	Trade Availability Information
368	Other Attributes of Person or Corporate Body
370	Associated Place
371	Address
372	Field of Activity
373	Associated Group
374	Occupation

New Tags in Enterprise/Elite 4

Tag	Description
375	Gender
376	Family Information
377	Associated Language
378	Fuller Form of Personal Name (NR)
380	Form of Work
381	Other Distinguishing Characteristics of Work or Expression
382	Medium of Performance
383	Numeric Designation of Musical Work
384	Key
385	Audience Characteristics
386	Creator/Contributor Characteristics
542	Information Relating to Copyright Status
588	Source of Description Note
662	Subject Added Entry
751	Added Entry
882	Replacement Record Information
883	Machine-generated Metadata Provenance
887	Non-MARC Information Field

New Import Template: RDA Master

A new Import Template is created during the upgrade to Enterprise/Elite 4. It is called RDA Master and will become the Default RDA Import Template if one doesn't exist. The RDA Template maps the Publisher field (date, publisher and place of publication) and Media Code field to these corresponding MARC Tags:

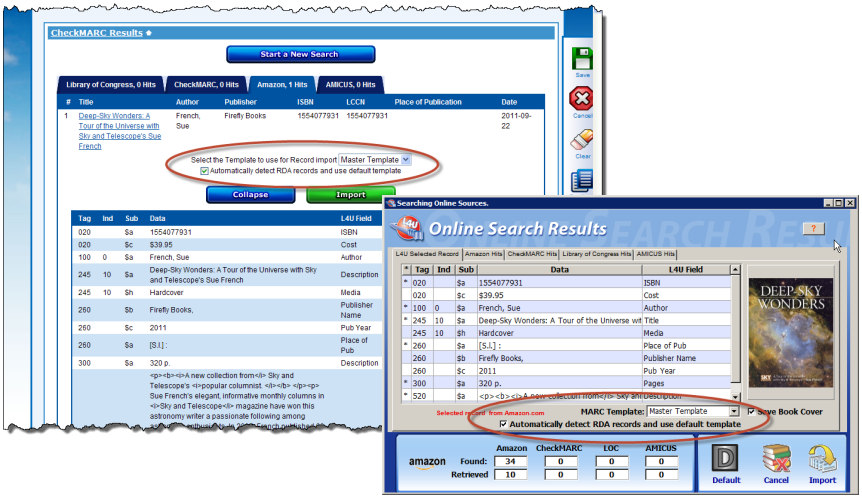
Media Code: 337a
Place of Pub: 264a
Publisher: 264b

Pub Year: 264c

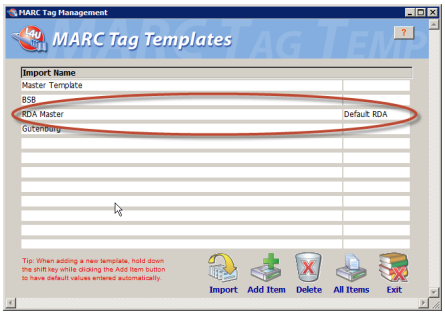
This Template can be selected when cataloguing in Freedom or the Admin Utility to deal with RDA materials.

Automatic Detection of RDA Records

L4U can automatically detect RDA MARC records upon import and select the default RDA Template. To do so:



1. Go to *File>Preferences* from the L4U Admin Utility
2. Click *MARC*
3. Click *Modify MARC Tags*
4. The *RDA Master* template should be the *Default RDA* template
5. If not, open the desired RDA Template and ensure the *RDA Default Template* option is checked
6. Click *Save* or *Exit* as appropriate to Save your Preference edits



Now, Click *Automatically detect RDA records* when cataloguing a new item

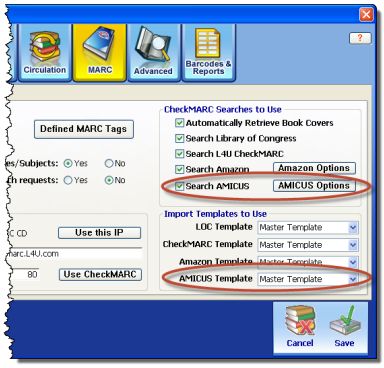
Note: L4U RDA Auto-detection checks the first record in an MARC Record Import to determine whether they all are RDA or non RDA.

CheckMarc Enhancements - AMICUS

AMICUS is a free MARC catalogue listing the holdings of libraries across Canada. L4U's CheckMARC feature can search AMICUS if desired. It is not necessary to have an account with AMICUS to retrieve records from their service. More catalogues are searched when you have an AMICUS Account. Please refer to the Library and Archives Canada for more information on AMICUS. Their website is: http://www.bac-lac.gc.ca/eng/Pages/home.aspx

Note: AMICUS Search in CheckMARC requires Microsoft Visual C++ 2008 SP1 Libraries installed on the L4U Server. The installers are supplied with the L4U Enterprise/Elite 4 Server install.

The AMICUS in CheckMARC feature is first enabled in Global Preferences and affects all Locations. To do so:



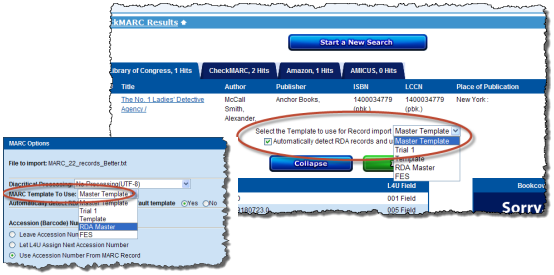
1. From the L4U Admin Utility, *File>Preferences*
2. Click *MARC*
3. Click *Search AMICUS*
   - If desired, Enter your AMICUS Account credentials via the AMICUS Options button
4. If another Import Template is desired for AMICUS imports, Select that template from the *Import Templates to Use>AMICUS Template*
5. Click *Save* to exit Preferences

Using AMICUS in CheckMARC

Using AMICS in CheckMARC is no different than using one of the other CheckMARC search locations. Click on the AMICUS tab to view the search results. For more information, please refer to "Cataloging with CheckMARC" on page 398 in the *L4U Users Manual* or "CheckMARC in Freedom Acquisitions" on page 94 in the *L4U Web Manual*.

Other CheckMARC Enhancements

The librarian can now select their preferred Import Template in addition to the Master Import Template. This applies to CheckMARC in Acquisitions and Importing MARC records. Please refer to "Master Import Template" on page 319 of the MARC Records chapter in the *L4U Users Manual*.



OverDrive Support

HOME
TOPIC SEARCH
MULTISEEK
Studebaker Smith-Henshaw HS
Local Library Results - 0
Britannica Results - 670
Wikipedia Results - 4303
OverDrive Results - 141
Showing 25 of 141 Search Results for little big horn at OverDrive
Click on an Item Title for more details
I Fought with Custer
Author: Frazier Hunt
More Details...
Counting Coup
Author: La Shawn B. Kelley

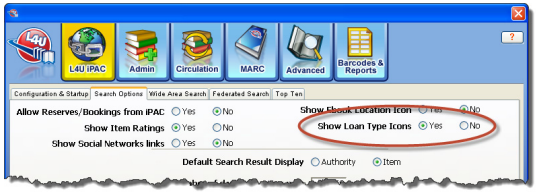
L4U supports Federated searching of your OverDrive licensed materials. Overdrive configuration is accomplished in Global Preferences in the L4U Admin Utility. Please refer to "Federated Search" on page 17 of the *L4U Web Manual* for more information. If your organization is licensed for OverDrive useage, please contact OverDrive to obtain your Search credentials. To enable OverDrive support in Federated Searches:

1. In the L4U Admin Utility, Go *File>Preferences*
2. From the L4U iPAC button, Click *Federated Search*
3. Check the *OverDrive* checkbox
4. Click *Setup* button for OverDrive
5. Enter the OverDrive supplied credentials
6. Click *Save*
7. Click *Save* to exit Global Preferences

If certain patrons are authorized to login to the Overdrive website, please enable *Allow Clients to login to Overdrive* in the patrons Homeroom Login Settings.

Enhanced Loan Type Graphics

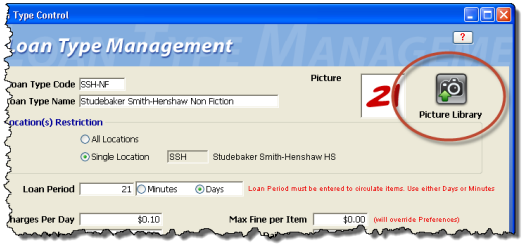
Loan Types are the most important of the Control Files as they are responsible for the circulation periods of library items. New to Enterprise/Elite 4 is the ability to select a graphic from a library of installed icons to differentiate parts of your collection. This high quality graphic can appear in the iPAC helping patrons to locate the material they're looking for. To enable this feature:



1. In the L4U Admin Utility, Go *File>Preferences*
2. From the L4U iPAC button, Click *Search Options*
3. Click *Yes* for *Show Loan Type Icons*
4. Click *Save* to exit Preferences

Adding a Loan Type icon to a Loan Type

If a Loan Type icon is to be associated with a Loan Type, it can be assigned in the Loan Type File. To assign a Loan Type icon to a Loan Type:



1. *Authority Files > Loan Types*
2. Locate the appropriate loan type record
3. Double Click the Loan Type
4. Click *Picture Library*
5. Select the desired icon from the list
6. Click *Load Picture*
   - If there is a picture already associated with this Loan Type, L4U will ask you if you want to replace it. Click *OK* or *Cancel* as appropriate.
7. Click *Save*

New Location Preferences

Location Preferences now have support for Location specific closure days (Holidays), Circulation Sounds and local control of the Top Ten feature. Local control of the Class List Import is also available. Please refer to "Batch Import: Global and Location Specific" on page 38 for more information on the Batch Import feature.

Holidays and Circulation Sounds

The location specific Holiday schedule allows the librarian to enter days the location is closed. Entering Holidays in Location Preferences is identical to the steps in Global Preferences. Please refer to “Holiday Management” on page 42 of the *L4U Users Manual* for more information.

Note: If Location specific holidays are enabled, all district wide holidays have to be entered as well.

Top Ten - Local Control

Local control over what Top Ten Features are enabled can be configured here. Please refer to “Top 10” on page 25 for more information on these features.

Batch Import

Librarian access to the Batch Import feature is available via this tab.

Federated Search

Local control over what Federated Searches are available and their configuration options are accessed via this tab. Please refer to “Federated Search” on page 17 in the *L4U Web Manual* for more information on Federated Search.

Web Settings

Currently, the only options here are for interlibrary Book Review access. Please refer to “Book Review Location Preferences” on page 10 for more information on these features.

Communal Locations

Materials in an EBOOK location are visible to all locations via iPAC searches. The Communal Location has this benefit but allows for more control to the Librarian. Homerooms that are given access to the Communal Location can administer that location in addition to their location. That means materials in that location can be circulated to any patron that belongs to that location.

In addition, items that belong to Communal locations will automatically show up in:

- iPac Searches
- Circulation searches
- The Report Wizard in the Admin Utility for Overdue Reports, Overdue Email notices and Overdue Letter
- Items Out Report: for both Freedom and the Admin Utility
- Freedom Overdue Letters

To create a Communal Location:

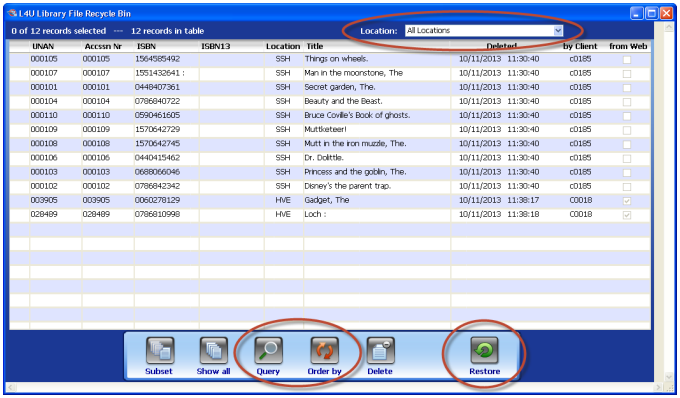
1. From within the Admin Utility, *Authority>Locations*
2. Click *Add*
3. Click *Yes* at the Communal Location dialog box
   - The Communal Location will be created for you with the location code pre-set
   - If you click Cancel and you don't have an eBook Location, L4U will ask if you want to create an eBook location
4. Enter a *Name*
5. Edit the *Preferences*
6. Click *Save*

For more information on Location Preferences, please refer to “Location Control File” on page 17 in the *Enterprise Administrator Manual*. New Location Preferences are discussed in “New Location Preferences” on page 22 in this manual.

Add this Location to the Homerooms that need admin access so they can create and administer materials in that Location.

Library File Recycle Bin

L4U Enterprise/Elite 4 includes the ability to restore deleted records. This feature is accessed in the Admin Utility and applies to the Library File deletions only. It is important to contact the L4U Application Specialist or the District Librarian as soon as possible after the incorrect deletion has occured. To restore deleted records:



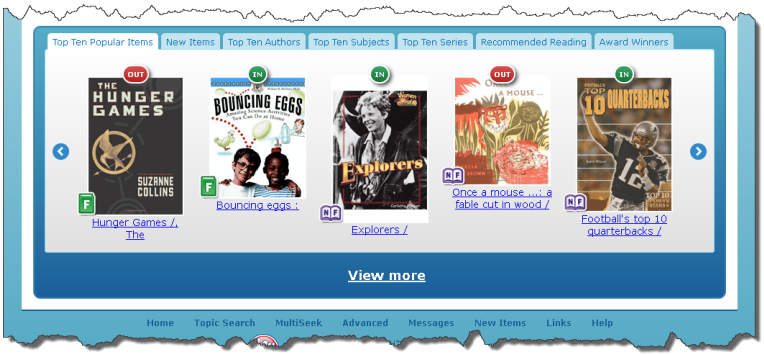
1. Login to L4U Admin Utility
2. Go *File>Utilities*
3. Click the *Special* tab
4. Click *Library File Recycle Bin*
   - A list of deleted items will appear
5. Select the desired Location from the Location drop down, if enabled

6. Locate the records to be restored using the *Query* or *Order by* buttons or scroll and highlight
7. Click *Subset* to make the highlighted records the current selection
8. Click *Restore*
9. Click *Yes* if this is what you really want to do
10. Click *OK* at the Recovered Record alert

Note: It is recommended to weed the Recycle Bin as part of the year end process or at other appropriate times.

Top 10

The Top Ten feature allows your library patrons to easily view new materials via the most popular titles, authors, subjects and series. Recommended reading and Award Winners can be selected by the librarian and updated when desired. The Top Ten feature is available for all locations after upgrading to Enterprise/Elite 4.



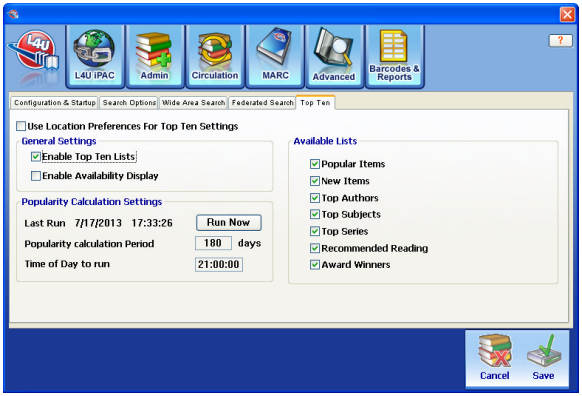
In addition to New Items, which is part of earlier versions of Enterprise/Elite, Top Ten will display:

- Top 10 circulating items
- Top 10 Subjects by circulation
- Top 10 Authors by circulation
- Top 10 Series by circulation

L4U calculates the Popularity of an item by it's history. Both Item and Client Histories have to be enabled for Top 10 to work properly. L4U will query the Histories table in the selected time frame and build a list by Accession Number. From this list, the Top Authors, Subjects and Series are derived.

Aspects of the Top Ten are modified in either Global Preferences or the Location's Preferences. Modifying this feature in Location Preferences allows the librarian to decide what Top Ten features are available. Global Preference settings can be pushed out to all Locations if desired, overwriting any Location settings.

To enable the Top Ten Lists:



1. From within the Admin Utility, Go *File>Preferences*
2. Click *Top Ten*
3. Click *Enable Top Ten Lists*
   - This has to be enabled for Top Ten to work
4. *Available Lists* - Enable or disable the desired lists by checking them on or off
5. *Enable Availability Display* - If enabled, L4U will display In or Out badge on the item.

6. Once the above settings are configured, Click *Use Location Preferences For Top Ten Settings* if it is desired to push these settings to all Locations.

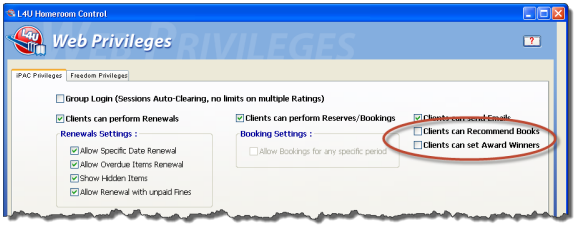
Warning: This will overwrite any customized Top Ten settings in the Locations.

7. Click *Save*
8. Re-open *Preferences*
9. Click *Top Ten*
10. Under *Popularity Calculation Settings*, Enter the desired time frame for these settings (or accept the default value)
11. Click *Run Now*
12. Click *Done* when L4U has finished building the Top Ten lists
13. Click *Save*

Note: The *Popularity Calculation Settings* can take some time on a large datafile, e.g: 45 minutes to an hour. Schedule the start time accordingly.

Homeroom Web Privileges and Top Ten Settings

After the Top Ten features are enabled in Global Preferences, the L4U Application Specialist or District Librarian can determine who can modify the Top Ten Lists. This is accomplished in the Homeroom Web Privileges. To do so:

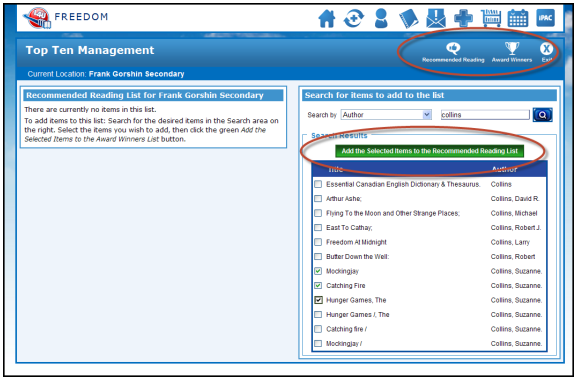


1. In the L4U Admin Utility, Go *Functions>Homerooms*
2. Open the desired Homeroom
3. Click *Web Privileges*
4. Check the desired options
5. Click *Save*
6. Click *Save* to exit Homerooms

Adding Materials to the Top Ten Lists

It is easy to add or update the Recommended Reading or the Award Winners. To do so:

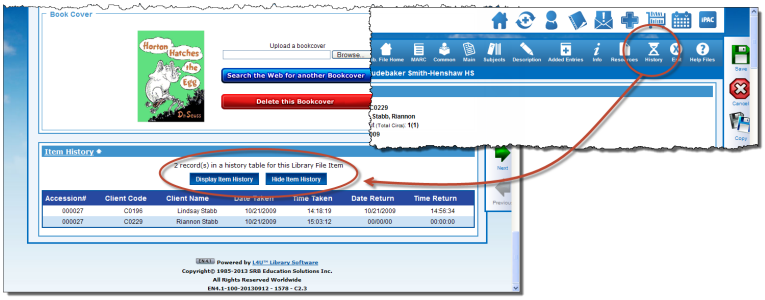
1. From the L4U iPac screen, Login to Freedom
2. Click *Library File*
3. Click *Top Ten Lists*
4. Select which *List* to modify
5. Select which *Field* to search on
6. Enter the search criteria
7. Click the *Magnifying Glass*
8. Check the desired items
9. Click *Add the Selected Items to the Award Winners List*
10. Perform other searches and modifications as necessary
11. Click *Exit* when finished to return to the Library File


FREEDOM
Top Ten Management
Current Location: Frank Gorshin Secondary
Recommended Reading
Award Winners
Recommended Reading List for Frank Gorshin Secondary
There are currently no items in this list.
To add items to this list: Search for the desired items in the Search area on the right. Select the items you wish to add, then click the green Add the Selected Items to the Award Winners List button.
Search for items to add to the list
Search by Author collins
Search Results
Add the Selected Items to the Recommended Reading List
Title
Author
Essential Canadian English Dictionary & Thesaurus. Collins
Arthur Ashe; Collins, David R.
Flying To the Moon and Other Strange Places; Collins, Michael
East To Cathay; Collins, Robert J.
Freedom At Midnight Collins, Larry
Butter Down the Well: Collins, Robert
Mockingjay Collins, Suzanne
Catching Fire Collins, Suzanne
Hunger Games, The Collins, Suzanne
Hunger Games /, The Collins, Suzanne
Catching fire / Collins, Suzanne
Mockingjay / Collins, Suzanne

Note: How L4U searches in L4U Freedom has changed since L4U v3.1. Please refer to "Freedom Search Update: How does it work?" on page 35 for more information on this important change.

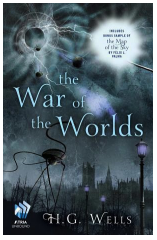
Item Histories in Freedom

If Item Histories are enabled in Global Preferences, it is now possible to review circulation history for Library File items. To enable Histories (if Histories are not enabled), please refer to "Item/Client Histories" on page 39 in the *L4U Users Manual*. To view Item Histories in Freedom:



1. From the iPAC screen, Login to Freedom
2. Click *Library File*
3. Locate the desired item
4. Open the record
5. Click *Histories* in the Library File toolbar
6. Click *Display Item History* to view this item's circulation history or *Click Hide Item History* to collapse the list.

Bookcovers - Add Your Own



L4U has the ability to add your own bookcover file to the item record. This is performed from within the item record in Acquisitions or Library File. Keep the graphic small, preferably 20 to 30Kb or 200x300 pixels in size. This is a two step process: Outside of L4U, locate and save the graphic and then import this graphic into L4U. To do so:

1. Log into Freedom
2. Click Acquisitions or Library File, depending on where the material is currently located
3. Locate the item that needs the new bookcover
4. Open the item
5. Click the Resources icon in the toolbar or scroll to the bottom of the screen

6. Click *Browse*
   - Navigate to where the graphic was saved, select it and *Open* it
7. Click *Save* to save the record
   - The bookcover does not show until the record is saved and reopened

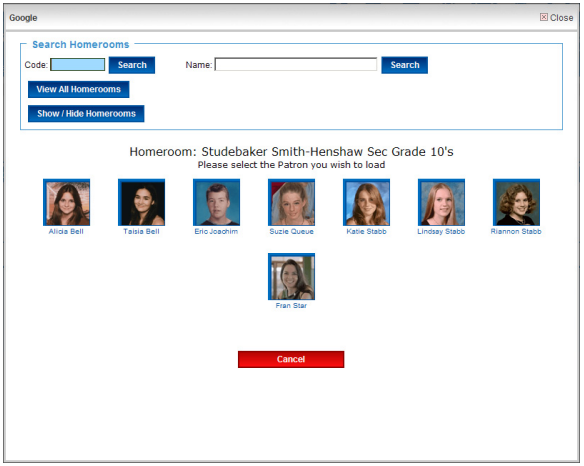
MARC Record View

It is now possible to view the MARC Record in Freedom. Previously this view was only available in the Admin Utility or when viewing the Item Detail in the iPAC. To view the MARC Record in Freedom:

1. From the iPAC screen, Login to Freedom
2. Click *Library File or Acquisitions*
3. Locate the desired item
4. Open the record
5. Click *MARC* from the Tool-bar
   - If you are creating the item at this point or have made any edits, L4U will inform you that it has to be saved first.
6. The MARC record of that item will display
7. Click *Go Back* to return to the previous screen

Freedom Circulation by Homeroom

The librarian can select patrons for circulation from an onscreen list via the Homerooms button in the Circulation dashboard.



This can be considered an electronic version of the class list printout so many librarians use at their circulation desk. To use this feature:

1. While in Freedom Circulation (not Basic Circulation), Click the *Homeroom* button the sidebar
2. From the Search window, perform one of the following steps to access the patron list:
   - Click *View All Homerooms:* displays a list of all your available homerooms
   - *Show/Hide Homerooms:* toggles between the patron list or homeroom list
   - *Code or Name field:* enter the desired Homeroom Code or Homeroom Name respectively and the Click the appropriate *Search* button
3. Click the desired Patron
4. Proceed with Circulation

Note: L4U will automatically display the list of the last Homeroom patrons to speed up circulation to the same class

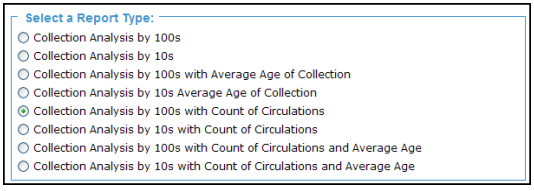
Freedom Report Enhancements

Enterprise/Elite 4 has many new Freedom Report enhancements. Overdue Letters, Collection Analysis Report, Quick & Statistical Reports are now part of Freedom.

Collection Analysis Report

The Collection Analysis Report allows the librarian to run statistical reports based on total number of items by Dewey or Loan Type that then supplies the average age of that part of the collection. In addition, circulation totals can be included to provide an idea of what is hot and what is not. Before running any of these reports, you have the option to report on all items in the location by a saved query and/or date range (circulation totals).

The Report Types are:


Select a Report Type:
Collection Analysis by 100s
Collection Analysis by 10s
Collection Analysis by 100s with Average Age of Collection
Collection Analysis by 10s Average Age of Collection
Collection Analysis by 100s with Count of Circulations
Collection Analysis by 10s with Count of Circulations
Collection Analysis by 100s with Count of Circulations and Average Age
Collection Analysis by 10s with Count of Circulations and Average Age

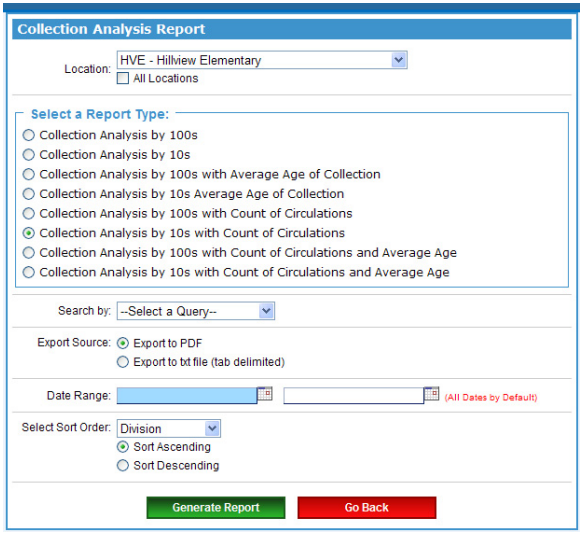
- *Collection Analysis by Dewey or Loan Type:* Total number of items in each category and percentage of the each category against the total number of items in the location.
- *Collection Analysis by Dewey or Loan Type with Average Age:* Same as above with the addition of the average age of each category.

- *Collection Analysis by Dewey or Loan Type with Circulation Totals:* Same as above with the addition of the total circulation count.
- *Collection Analysis by Dewey or Loan Type with Circulation Totals and Average Age:* All the options available for the report.

The Analysis Report will summarize the Total Number of Unique Titles for this Location, the Total Number of Copies for this Location and the Average Age of Entire Collection.

Dewey collection analysis is pulled from the Dewey Field and grouped into 100's or 10's, as selected. For example:
000 = all Deweys that start with 0
010 = all Deweys that start with 01
100 = all Deweys that start with 1
200 = all Deweys that start with 2

To use the Collection Analysis Report:


Collection Analysis Report
Location:
HVE - Hillview Elementary
All Locations
Select a Report Type:
Collection Analysis by 100s
Collection Analysis by 10s
Collection Analysis by 100s with Average Age of Collection
Collection Analysis by 10s Average Age of Collection
Collection Analysis by 100s with Count of Circulations
Collection Analysis by 10s with Count of Circulations
Collection Analysis by 100s with Count of Circulations and Average Age
Collection Analysis by 10s with Count of Circulations and Average Age
Search by:
--Select a Query--
Export Source:
Export to PDF
Export to txt file (tab delimited)
Date Range:
(All Dates by Default)
Select Sort Order:
Division
Sort Ascending
Sort Descending
Generate Report
Go Back

1. From the iPAC screen, Login to Freedom
2. Click *Reports*
3. Under Item Reports, Click *Collection Analysis Report*
4. Select the desired location from Location drop down, if you have access to more than one.
   - Check *All Locations* to report on the entire collection if you have access to All Locations
5. Select a *Report Type*. Please refer to the list on page 30.
6. Select a *Saved Query* if desired. Please refer to "Query In Library File" on page 116 in the Data Management chapter in the *L4U Web Manual*.

7. Select a destination for the Report. These options are explained in more detail on page 32 in *Destination of the Collection Analysis Report*
8. If *Count of Circulation* option is selected, a Date Range can be entered if desired
9. Select the *Sort Order* if Division is not preferred
10. Select the *Sort* direction
11. Click *Generate Report* to produce the report or Go Back if this is not the correct report

Destination of the Collection Analysis Report

L4U will perform two different actions when the report is generated, depending on what option is selected in Export Source (Destination).
If *Export to PDF* is selected:

1. L4U will Alert the user to the number of records to be processed. If this is a large number (e.g.: >50,000 records), it is desirable to run the report at the end of the day.
2. Click *OK*
3. Click *Download Report*
4. L4U will open the PDF report in another window/tab, depending on your browser settings
5. Print or Save the window, depending on your browser
6. Close the finished report window when finished

If Export to txt file (tab delimited) is selected:

1. L4U will Alert the user to the number of records to be processed. If this is a large number (e.g.: >50,000 records), it is desirable to run the report at the end of the day.
2. Click *OK*
3. Click *Download Report*
4. L4U will open the report in another window/tab, depending on your browser settings.
5. Print or Copy to the clipboard as appropriate
6. Close the finished report window when finished

Note: *Show Log* will open a Log File with the actions taken on all the items. This can be a large file so expect a delay in opening this file. A collection of 30,000 items will produce an on screen report of approximately 550 pages.

Overdue Letters in Freedom

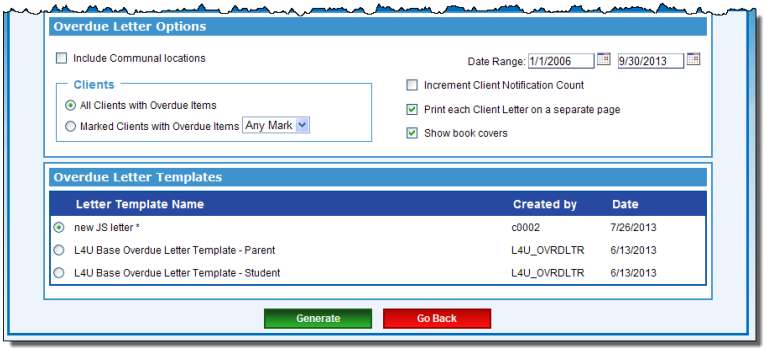
Overdue Letters can be printed from Freedom. Current Overdue Letters need to be converted first before they can be used in Freedom. It is assumed that Overdue Letters already exist in the current location. However, the upgrade to Enterprise/Elite 4.1 will install two Overdue Templates automatically. One is designed for the patron and the

other is for the parent or guardian. The Admin Utility is required to create and convert the Overdue Letter templates. To do so:

1. From the Admin Utility, go *File>Utilities*
2. Click the *Special* tab
3. Click *Convert Overdue Letters*
4. Click *OK* at the confirmation dialog box

Using Overdue Letters in Freedom

Using Overdue Letters in Freedom is easy. Select the Patrons, the date range of the Due Dates and any other features that are needed. To do so:



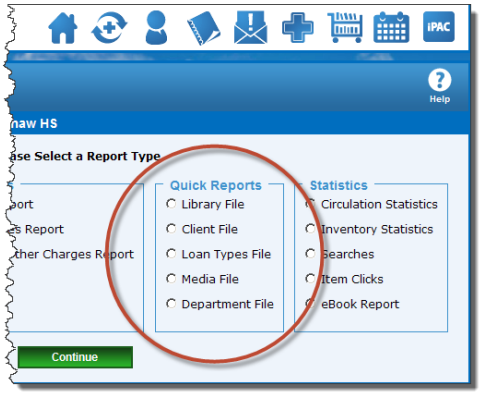
1. From the iPAC screen, Login to Freedom
2. Click *Overdue Letters*
3. Check *Include Communal Locations* if materials from Communal Locations are desired on the letters. Please refer to Communal Locations
4. Choose which Client selection to use:
   - *All Clients with Overdues* - will print letters for all clients with overdues
   - *Marked clients with overdue items* - will print letters for only those clients that are marked. Either leave the default of *Any Mark* or select a specific mark from the drop down list.
5. Set the *Starting Date* and *Ending Date*
6. Modify or Select the following options
   - *Increment Client Notification Count* - if selected, L4U will track how many times the client has been made aware of their overdues.
   - If printing overdues for multiple clients, Select the *Print each client on a separate page* option or leave unchecked for a summary report containing all clients on a single print out.
   - Check *Show Book Covers* to include a thumbnail of the item's bookcover if there is one on file.
7. Select the desired template from *Overdue Letter Templates*
   - Use the L4U Admin Utility to convert existing Overdue Letter templates or create new templates.

8. Click *Generate*
9. Use the internet browser Print function to print the letters

Note: The *Marked Clients with Overdue Items* drop down list is populated by each unique instance of a mark that appears in the Client file. Marks must be entered into the Clients file prior to using this feature. Marking Clients is currently available in the Admin Utility only and will be available in a future release L4U Freedom.

Quick Reports

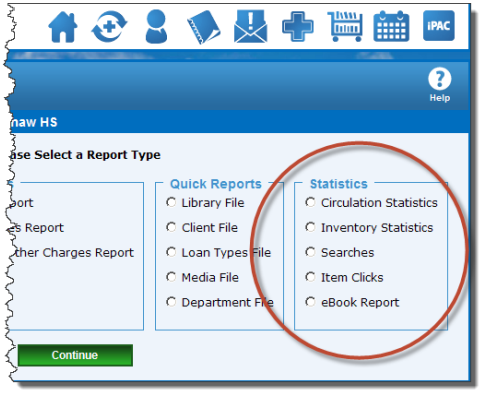
Popular Report Templates from the Admin Utility are now found in Quick Reports. Quick Reports allow the librarian to select the Report Template (and optionally) to search or filter for specific items. To do so:



1. From the iPAC screen, Login to Freedom
2. Click *Reports*
3. Under Quick Reports, Select the preferred file
4. Click *Continue*
5. Select the desired Report template from the Report drop down list
6. If a search is required to narrow the report results, Select the *Field* from the *Report On* drop down and enter the search value
7. Click *Generate Report*

Statistics Reports

L4U Freedom has a new reports section devoted to Statistics. In addition to the standard Circulation Statistics by Loan Type & Inventory variance reports, new reports relating to patron's use of the iPac & eBook useage. Enable Statistics must be enabled in Global Preferences for these reports to function. Please contact the District Librarian or the L4U Application Specialist if you do not have access to Global Preferences.



To Enable Statistics:

1. From within the L4U Admin Utility, Select *File>Preferences*
2. Click *L4U iPAC* button
3. Click *Search Options* tab
4. Click *Yes* for *Enable Statistics*
5. Click *Save*
6. Restart the L4U Server

To access these reports:

1. From the iPAC screen, Login to Freedom
2. Click *Reports*
3. Under Statistics, Select the desired report
4. Click *Continue*
5. Select the desired attributes from the various drop down lists
6. Click *Generate Report*

Note: Statistics are calculated at 2AM every morning.

Circulation Statistics

This report lists the total circulations by specified date range for the location's Loan Types. Sort the results by Loan Type Code, Loan Type Name or Total Circs.

Inventory Statistics

These inventory variance reports are used when an inventory is active. Please refer to the Inventory chapter in the *L4U Web Manual* for more information.

Searches and Item Clicks

These reports generate statistics on Searches or Item Clicks by time period and by grouping with various options and sorts. Item Clicks are counted when a patron opens an item in the iPAC.

eBook Report

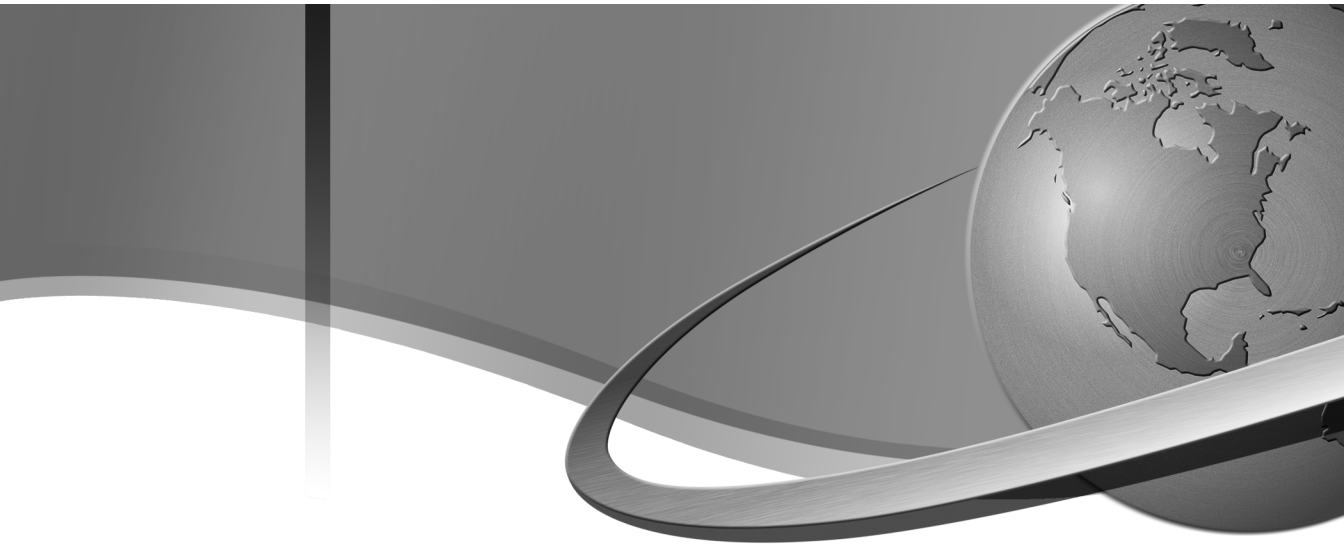
This report provides the librarian with statistics on their eBook material quantities, useage and other useful information. More information on this eBook feature is found on page 12.

Freedom Search Update: How does it work?

Searching on certain fields has changed in Enterprise 4.x and above.

- *Subject* and *Title* field searches are now a CONTAINS search.
- All other fields function as they have in the past (except *Keyword* - see below) are a STARTS WITH search unless you prefix the search string with the L4U wildcard. This changes the search from a STARTS WITH to a CONTAINS. The L4U wildcard is the @ sign.

- How Keyword searches depends on the Keyword Search setting in *Global Preferences>L4U iPAC>Search Options>Keyword Search* settings. If both options are *No*, then Keyword searches are always EQUALS (i.e: An Exact search).



CHAPTER 3

FOR THE TECHNICIAN

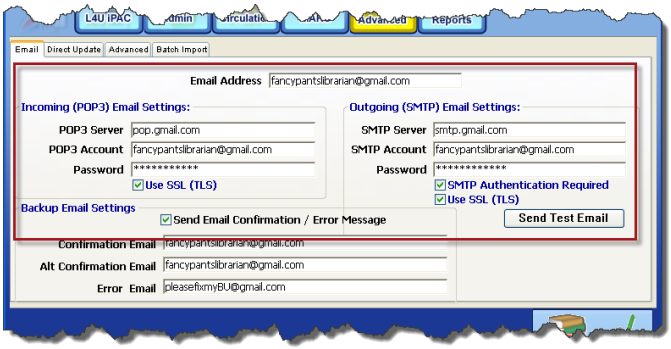
- Added POP3/SMTP SSL Support
- Backup Failure emails
- Location Batch Import

L4U Enterprise/Elite 4 New Features - For The Technician

The key new features in Enterprise/Elite 4 for the IT Department are documented below.

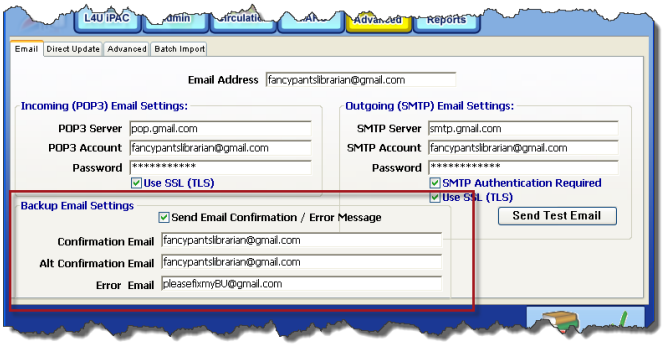
Enhanced eMail Protocols

Enterprise/Elite 4 includes SSL and TLS support. This allows the use of email providers such as GMail or other email providers that require these protocols. For more information on configuring these settings, please refer to “Email” on page 52 in the *L4U Users Manual*.



Auto Backup Alerts to L4U Support

If an L4U scheduled backup fails, a non-interrupting alert is shown on the server console and an email is automatically sent to L4U support. This is in addition to the Error Email address in Global Preferences.



Batch Import: Global and Location Specific

It is now possible to have Patron/Class lists automatically imported on a location specific basis separate from a Global Patron/Class import. This batch import feature allows for local control of special requests from the librarian. For example, if patron’s

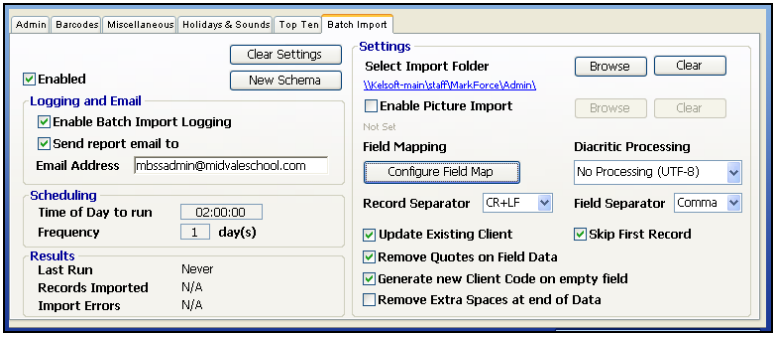
emails are stored in a local SIS system, those files can be exported and then imported for that location.
The Location Preferences Batch Import condenses the five steps of the Import Wizard into one screen. For more information on the specific features of the Client Import, see “Import Client Data” on page 332 in the *L4U Users Manual*.

The Batch Import is available in Global and Location Preferences in addition to the Import Wizard. The purpose of this is to:

- *Global Preferences:* This is found in Advanced and allows scheduled import of patrons from multiple locations.
- *Location Preferences:* L4U will look in this location only when performing a Batch Import.
- *Import Wizard:* This feature allows for the importation of class lists manually, one at a time.

Batch Import allows the creation of multiple setting files called schemas. The schemas contain the what, where and when of the import. Files from different folders can then be imported at different times.

To configure the first schema for a scheduled Batch Import:



For Global Batch Imports:

1. From the Admin Utility, Go *File>Preferences*
2. Click *Advanced*
3. Click the *Batch Import* tab
4. Go to “Scheduled Batch Import” on page 40

For Location only Batch Import:

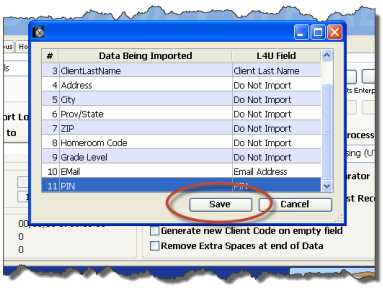
1. From the Admin Utility, Go *Authority Files > Locations*
2. Open the desired Location
3. Click *Preferences*
4. Click the *Batch Import* tab
5. Go to “Scheduled Batch Import” on page 40

Scheduled Batch Import

1. Ensure *Enabled* is selected
2. Under *Settings*, Click *Browse* to Select the Import Folder location
3. In the open dialog, Locate and Click the appropriate folder, Click *Open.*

Note: All files in this folder will be imported using this Schema's settings

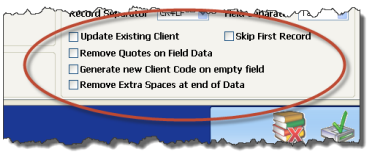
4. If patron pictures are available, Click *Enable Picture Import.* If not, proceed to Step 6.
5. Click *Browse* to Select the Picture Import Folder location. Please refer to "Importing Client Pictures" on page 335 in the *L4U Users Manual* for more information.
6. Select the appropriate *Record Separators* and *Field Separators* from the drop-down menus
   - These are the characters that separate the individual records and the individual fields within the records
7. If diacritics are present in the source data, select the appropriate format from the drop down list. Please refer to "Diacritic Import Options" on page 334 in the *L4U Users Manual*.
8. Click *Configure Field Map* to assign which imported data goes into which L4U Field.
   - This is achieved by Double Clicking on the *L4U Field* to the right of the Data field to be mapped. On the screen that appears, use the drop down list to assign the *L4U field* and Click *Save*.
   - To skip a field during import, leave the drop down list set to *Do Not Import*.



9. Once all necessary field assignments are complete, Click *Save* to exit the *Configure Field Map* window.

Client Import Options

10. Review the Client Import Options
    - *Update Existing Client Data*: Use this option when some or all clients already exist in the data file, and you are importing a file with corresponding client codes and new data (Example: Student has moved and/or graduated to next grade level). L4U uses the client code to match the import data to the client pre-existing in the L4U data file. If no matching client code is found a new record is generated.


Update Existing Client
Skip First Record
Remove Quotes on Field Data
Generate new Client Code on empty field
Remove Extra Spaces at end of Data

- *Skip First Record*: This option should be selected when the source file contains a header record
- *Remove Quotes on Field Data*: Some text files use quotes as text qualifiers. These can be removed during import by selecting this option
- *Generate New Client Code on empty field*: If this option is deselected and Update Existing Client Data is enabled and L4U does not find a match for the Client Code when importing, L4U will skip that client. If it desired to have L4U import all clients during an import, enable this option. L4U will use the Client Code counter in Global Preferences (see "Enterprise Client File Barcodes" on page 57 in the *L4U Users Manual*)
- *Remove Extra Spaces at end of Data:* Use this option to clean up poorly formatted data

Scheduler and Logging Options

11. By default, L4U will run this import Schema at every day at 3AM. If another time is required, enter the new start time in 24 Hour format.
12. If another frequency is desired for the date interval, enter the number of days between imports in the *Frequency* field.
13. An optional Log can be created if desired.
    - *Enable Batch Import Logging:* Enable this option if a log of the Import is required.
    - *Send Report Email:* Confirmation of the Import can be accomplished by entering an email address here.

Final Step

14. Click *Save* to exit *Location Preferences*
    - This will be the *Default Schema*. This is all that is required to configure the scheduler if no other schemas are required.
15. Click *Save* to save the changes to this Location

Warning: When using the Update Existing Client Data option, fields will be overwritten with the data in the imported file. In other words, Import does not append to a field -- it overwrites the contents of that field.

Schema Management - New Schema

A Default Schema is automatically created the first time the Batch Import is configured and saved. It is possible to have more than one schema and manage them separately. The following steps will create a new schema in a specific location, but these steps are the same for a Global Batch import. To create a new schema:

1. From the Admin Utility, Go *Authority Files* > *Locations*
2. Open the desired Location
3. Click *Preferences*
4. Click the *Batch Import* tab
    - The settings for the last saved Schema are displayed

5. Click *New Schema* to save the current settings and enter a Name for those settings
6. Click *Ok*
7. Make any desired edits
8. Click *Save* to exit *Location Preferences*
9. Click *Save* to save the changes to this Location

Schema Management - Modifying a Schema

Modifying a Schema is very easy as edits to the currently selected Schema are saved when the Batch Import is saved when exiting. For example:

1. From the Admin Utility, Go *Authority Files > Locations*
2. Open the desired Location
3. Click *Preferences*
4. Click the *Batch Import* tab
   - The settings for the last saved Schema are displayed
5. Select the desired Schema from the drop down list
6. Make any desired edits
7. Click *Save* to exit *Location Preferences*
8. Click *Save* to save the changes to this Location

A
Add Bookcover 28
AMICUS 20
    in CheckMARC 20
Availability Display 6
B
Batch Import
    Client Import Options 40
    Overview 38
    Save Settings 41
    Scheduling 40
    Schema 41
Book Reviews 4
    Config 10
    Enabling 10
    Interlibrary reviews 23
    Location Preferences 10
    Moderating 11
    Moderators 10
Bookcovers
    Custom 28
C
Circulation
    by Homeroom 29
Circulation Sounds 23
Clients 37
Collection Analysis Report 30
Communal Locations 23
Control Files
    on the Web 12
D
Diacritics
    Importing Clients 40
E
Easy Labels
    Adjust 16

eBook Enhancements
iPAC 6
Overview 12
eMail
Auto Backup Alerts 38
Configuration 38
Enhanced eMail Protocols 38
F
Federated Search
iPac display 7
Wikipedia 7
World Book 7
Freedom Searching 35
H
Help
Context Sensitive vii
iPAC vii
Homeroom Circulation 29
Homerooms
on the Web 12
I
Inventory Reports 35
iPAC
Help vii
iPAC Enhancements
Availability 6
Searching 4
Status Badge 6
Item Histories 28
L
Library File Recycle Bin 24
Loan Type Graphics 22
Location Management
on the Web 12
Location Preferences
Batch Import 23

Circulation Sounds 23
Federated Search 23
Holidays 23
New 22
Top Ten 23
M
MARC Record View
in Freedom 29
O
OverDrive 21
Overdue Letters 32
P
Patrons 37
See Clients
PDF Labels
Modifying 15
Overview 13
Printer Calibration Wizard 13
Using 14
Phrase Search in iPAC 4
Q
Quick Reports 33
R
RDA Support 16
Automatic Detection 18
New tags 17
RDA Import Template 18
Reports
Collection Analysis Report 30
Overdue Letters 32
Quick Reports 33
Statistics Reports 34
S
Schemas in Batch Import 41
Search Enhancements 4
Double Quotes 5

Phrase Search 4
Searches
Changes 35
Statistics Reports 34
Circulation Statistics 35
eBook useage 35
Inventory Statistics 35
Item Clicks 35
Search Summaries 35
to Enable 34
Status badge 6
T
Top Ten
Creating or Modifying 27
Enable 26
Overview 25
Who can create 27
W
Web Administration 12
How to Access 12
Options 12